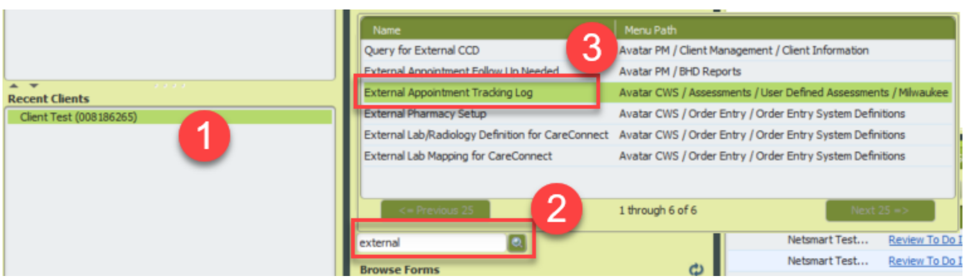
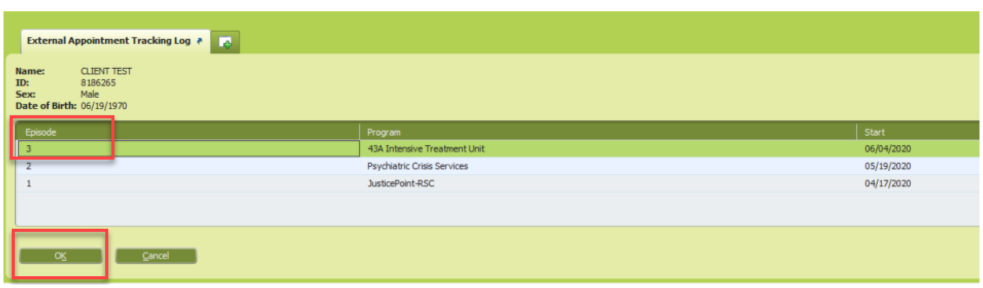
External Appointment Tracking- use the guidelines and tools below to track progress and check the current status of a client's physical care consultations with community based providers.

A. **External Appointment Tracking Log Form-** the tracking log is an episodic form used to document the status of external appointments to assure that all consultations are completed in a timely manner and that the report of the consultation is documented in Avatar. The tracking log can be updated throughout the appointment process. To begin the process, from Home View:

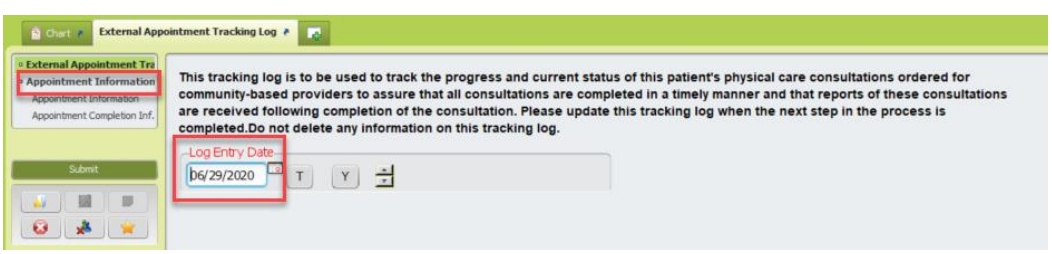
1. Select your client
2. Enter external in the Search Forms box.
3. Select the External Appointment Tracking Log.



In the pre-display, select the appropriate episode of care. Click OK.

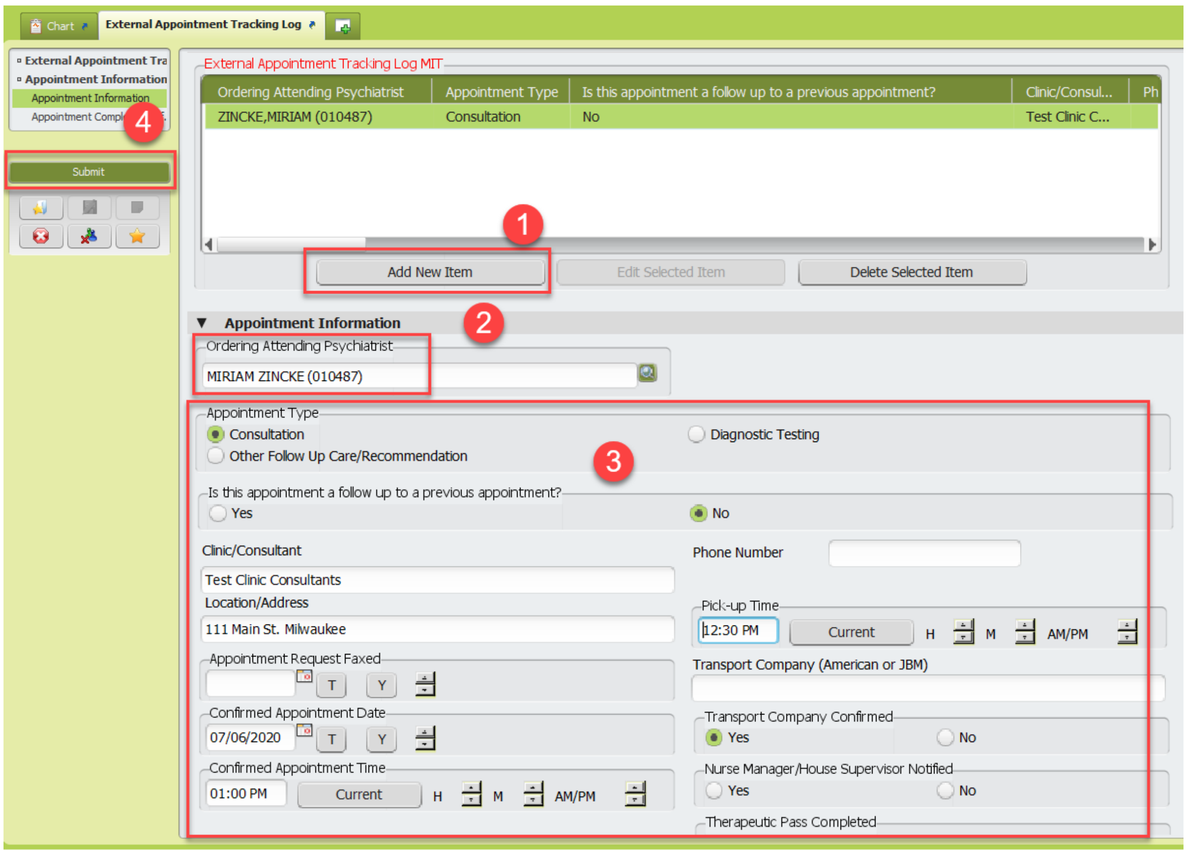


If this is a new appointment, the form opens. The Log Entry Date pre-populates and you should not need to change it. Click Appointment Information to move to the next section of the form.

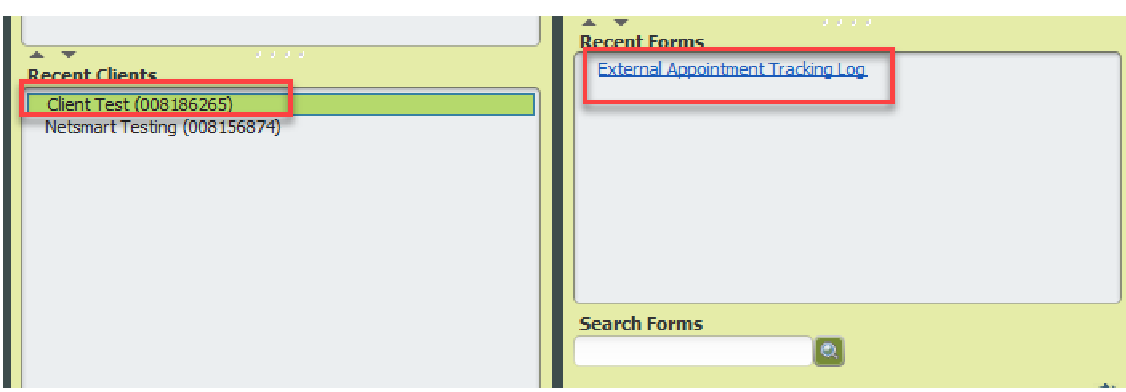


The form consists of 2 sections, Appointment Information and Appointment Completion Information. To add a new appointment:

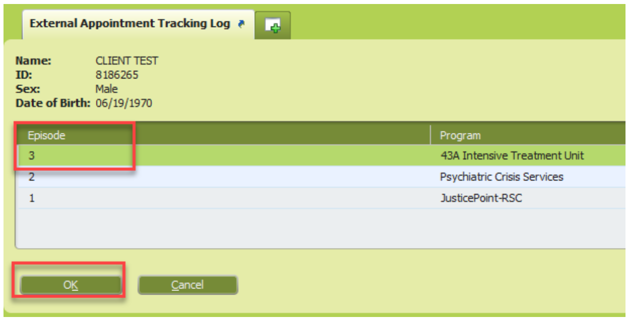
1. Click ‘Add New Item’.
2. Enter the Ordering Attending Psychiatrist’s name (physician that ordered the appointment).
3. Enter the appointment type and as many other details of the appointment as you have when initially completing the form. You can always go back in and edit/update details of the appointment as needed. As you add details, the table in the top portion of the form is populated.
4. Click Submit. The appointment completion information is filed after the appointment is done.



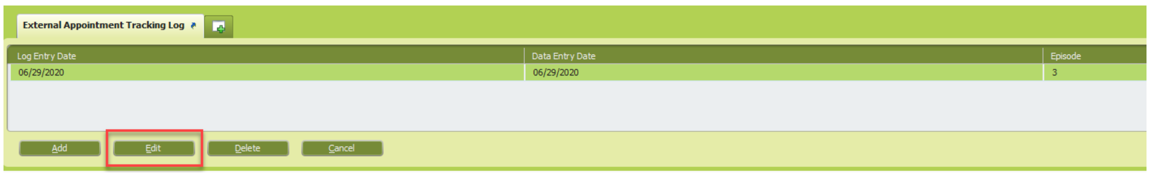
Change/update details in an existing appointment, add appointment completement information, or add a new appointment- from Home View, select the client and select the External Appointment Tracking Log Form.



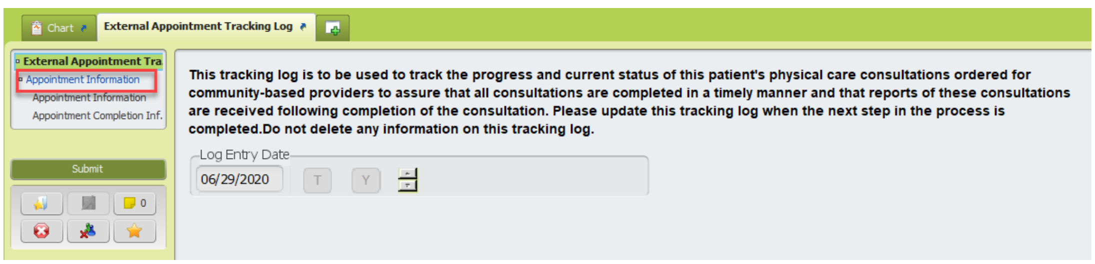
Select the appropriate episode and click OK.



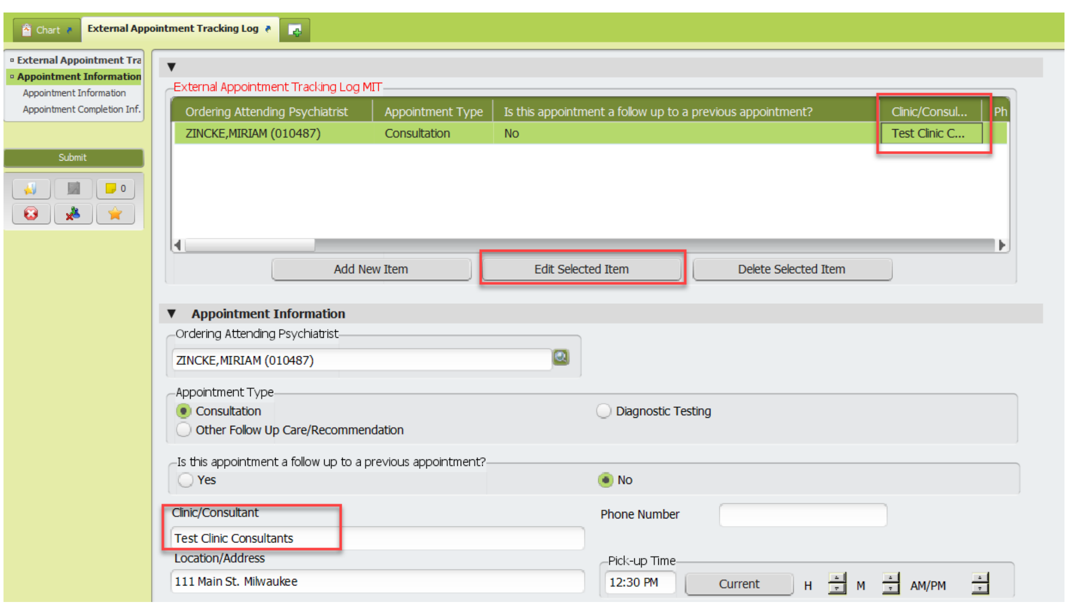
Click Edit to: change/update details in an existing appointment, add appointment completement information, or add a new appointment.



The form opens; select Appointment Information. Note the original log entry date (can't be edited).

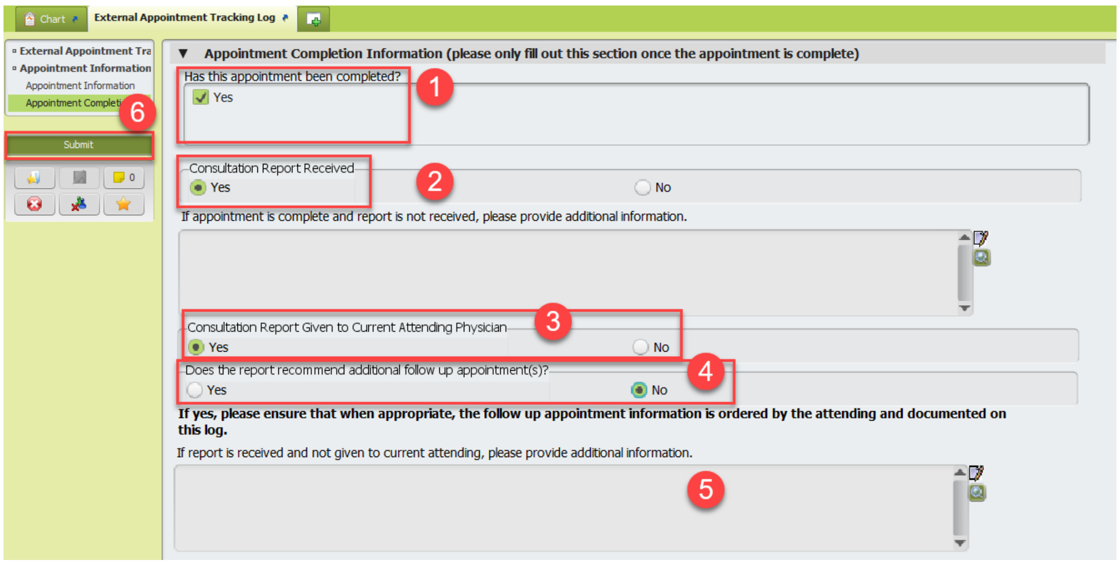


To change/update appointment details, select the information in the table to update and click Edit Selected Item. Edit the information in the appropriate section of the form. (You can also choose to delete information by selecting the row in the table and click 'Delete Selected Item'). Only 'Delete' a row of information if it was entered entirely in error. Otherwise, use the Edit functionality.

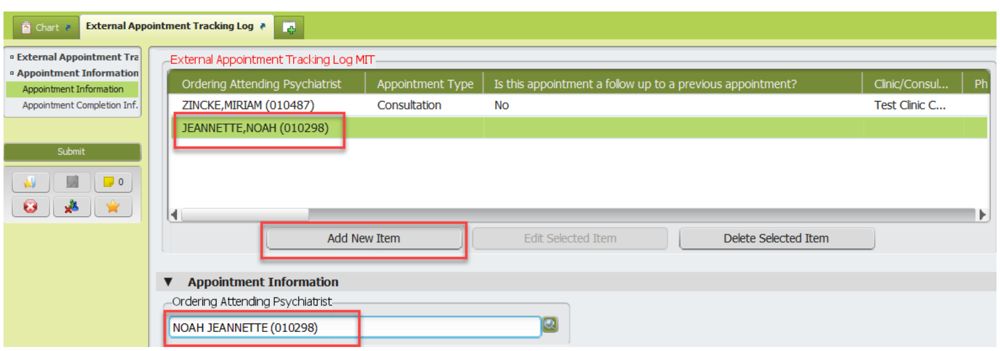


To enter appointment completion information, scroll to the bottom of the form.

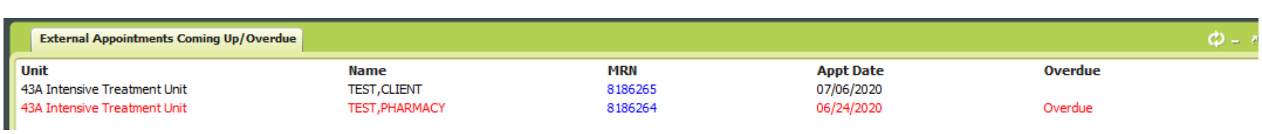
1. Select Yes that the appointment is complete.
2. Select Yes or No that the Consultation Report was received. If no report is received,
3. Select Yes or No that the Consultation Report was given to the <u>Current Attending</u> Physician. (Note that the <u>Current Attending</u> Physician can be different then the <u>Ordering Attending</u> Physician listed in the appointment information section on the top half of the form).
4. Indicate whether or not a follow-up appointment is needed.
5. Enter additional information if the report was received and not given to the current attending physician.
6. Click Submit.



To add another external appointment to the client's tracking log, click 'Add New Item' on the top portion of the form. A new row of data is created to enter new appointment information. As new appointment details are added, they are displayed in the second line of the table.

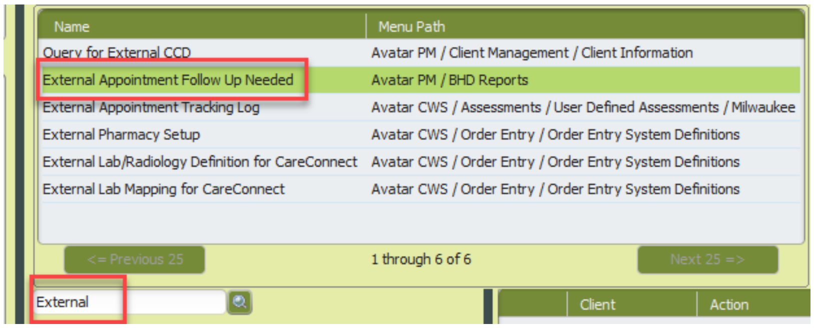


B. **External Appointments Coming Up/Overdue Widget-** this new widget is available on both the Inpatient Staff Console and Inpatient Nursing Console. The widget displays appointments coming-up in the next 7 days or overdue appointments. The appointment will display in red the day after the appointment date if the appointment completion section of the form is not completed. The widget is sorted by inpatient unit. Click the medical record number (blue hyperlink) on the widget to open the External Appointment Tracking Log form for the client.

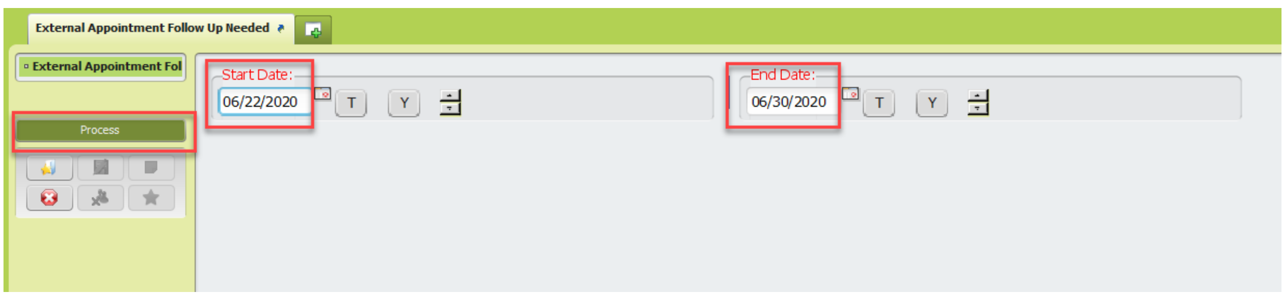


C. **External Appointment Follow Up Needed Report-** run the report for a specified time period to review external appointments that haven't been completed or missing important pieces of information such as, whether a report has been received and if so, the report was given to the current attending physician. From Home View:

Enter External in the Search Forms box and select External Appointment Follow Up Needed.



Enter a start and end date for the period you want to review. Click Process.



The report displays various details of the external appointments logged in the specified timeframe and provides a quick summary of external appointments needing follow-up.

Milwaukee County Behavioral Health Div.
9455 W Watertown Plank Rd
Milwaukee, WI 53226-3559

External Appointment Follow Up Needed

43A Intensive Treatment Unit

Patient Name	MRN	Appointment Type	Ordering Attending Psychiatrist	Clinic/ Consultant	Phone #	Location/Address	Appointment Request Faxed	Confirmed Appointment Date	Confirmed Appointment Time	Completed?	Report Recieved	Report given to current attending
POTTER,HARRY	8186262	Consultation	NORTON,DIANA	adfadfasdf	434-434-4343	adfasdfasdf	5/20/2020	05/25/2020	01:38 PM	Yes	No	No
TEST,PHARMACY	8186264	Consultation	NORTON,DIANA	asdfasdfasdfasdfa	414-414-4141	asdfasdfasdfasdf	6/24/2020	06/24/2020	02:06 PM			
TEST,CLIENT	8186265	Consultation	ZINCKE,MIRIAM	Test Clinic Consultants		111 Main St. Milwaukee		07/06/2020	01:00 PM			